

NEWS

For Immediate Release

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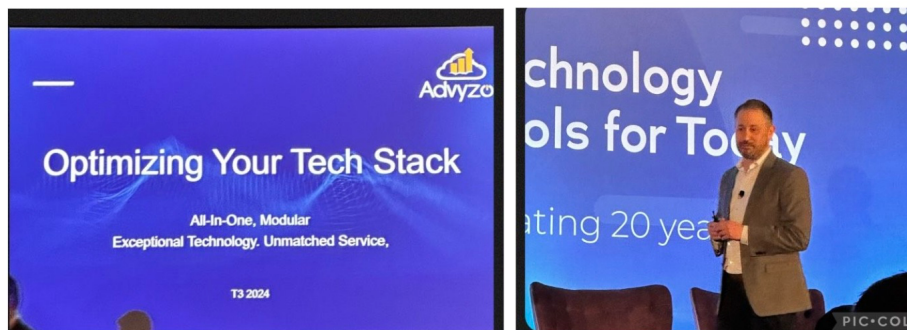
Advyzon Named Best All-In-One Software Solution for 7th Consecutive Year in 2024 Advisor Software Survey from T3 and Inside Information

In addition, comprehensive technology platform introduces new Chief Financial Officer

CHICAGO, IL (February 1, 2024) – [Advyzon](#), a comprehensive service and technology platform and portfolio management solution for financial advisors and investment managers, recently achieved high client satisfaction ratings in multiple categories in the [2024 T3 / Inside Information Software Survey](#) – including earning the highest rating in the All-In-One Software category for the seventh year in a row.

The results of the annual technology survey and report, produced by [Joel Bruckenstein of T3 Technology Tools for Today](#) and [Bob Veres of Inside Information](#), were unveiled and presented live at the recent [T3 Technology Conference](#), which took place January 22nd – 25th in Las Vegas and saw over 1,000 total attendees.

“We’re so excited to yet again achieve top ratings in this industry-leading survey and report,” said John Mackowiak, Chief Revenue Officer at Advyzon. “Client satisfaction ratings are one of the key components for analyzing the success of Advyzon, and it’s always an honor to see that our clients are highly satisfied with the various components of our platform.”



Lee Andreatta, CEO of Advyzon Investment Management, LLC. (AIM), gave a powerful presentation on how financial advisors can optimize their tech stack at the T3 Technology Tools for Today conference in Las Vegas.

The report dubbed client satisfaction ratings higher than 8 “remarkable” in its summary findings:

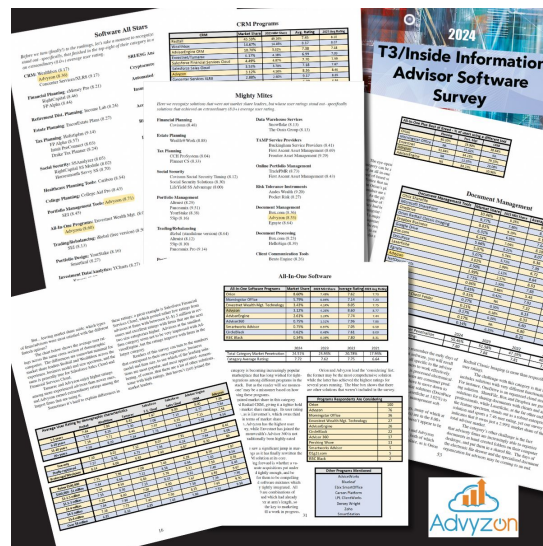
- Advyzon received the highest client satisfaction rating (8.60) in the All-In-One Software category – a feat they have now accomplished for the past seven years (every year since 2018)
- Advyzon scored the second-best overall client satisfaction rating (8.71) in the Portfolio Management/Reporting Tools category, and the highest overall for firms with more than 1.5% market share
- Advyzon received the second-best overall client satisfaction rating (8.36) in the CRM Programs category, and the highest overall for firms with more than 3% market share
- Advyzon received the second-best overall client satisfaction rating (8.53) in the Document Management category

In addition, in every category Advyzon was featured in, they were one of the most often named ‘Programs Respondents Are Considering’. The report notes that “Advyzon, with sparkling user ratings, is poised to pick up market share if the number of survey respondents indicating an interest is any indication.”

Thanks to their stellar ratings, Advyzon was dubbed a “Software All Star” – solutions that finished in the top eight of their categories in market penetration and also achieved an extraordinary (8.0+) average user rating – in three categories: All-In-One Software, Portfolio Management/Reporting Tools, and CRM Programs. Only four other firms besides Advyzon were included in the “Software All Star” list in multiple categories.

Advyzon was also named to the list of “Mighty Mites” in Document Management – solutions that were not market share leaders but achieved an extraordinary (8.0+) average user rating.

To see the full T3 / Inside Information Software Survey results, with insights and analysis from Veres and Bruckenstein, [please click here](#).



ALL-IN-ONE VS. BEST-OF-BREED, IN-HOUSE VS. INTEGRATIONS

The industry debate of comprehensive technology solutions vs. best-of-breed tech stacks continues to rage on, but the report shows that in addition to being the highest rated All-In-One solution, one could plausibly call Advyzon a best-of-breed solution in each of the various categories it fits into. Advyzon’s ratings across all of the categories it qualified for were among the highest of the more than 800 programs featured in the report.

While most of the solutions providers in the All-In-One Software category have taken the “All-In-One-by-acquisition trend” by purchasing and merging best-of-breed software from multiple categories, Advyzon has been an exception to this trend, as all of the platform’s solutions were built in-house on single-source code.

“For best results, the experience needs to be cohesive – and the best way to do that is to build it yourself from the ground up rather than try to stitch things together,” said Mackowiak. “Building it ourselves has really given us – and our users – an advantage, and the seamless experience allows advisors to be more efficient and focus on what they do best.”

In addition, the report shows that for most of the providers in the All-In-One Software category, a high percentage of their users are using a different tool for various solutions: “Advyzon, with its built-in-house solutions, which are more tightly integrated, is the only program where the majority of its users are actually using its full feature set.”



Joel Bruckenstein and Bob Veres took the stage at the Technology Tools for Today conference at the Cosmopolitan in Las Vegas to unveil the much-awaited results of their annual software survey on January 23, 2024.

MARKET SHARE INCREASE AND EXTRAORDINARY RATINGS AMONG LARGER FIRMS

Another takeaway from the 2024 report is that Advyzon is gaining ground among larger advisory firms: “Advyzon has traditionally been a solution for fee-only advisors and firms with \$3 million or less in aggregate revenues, and that still seems to be its center of gravity. But there has been market share movement into the larger firm space as [Advyzon] has built out its feature set and priced it competitively.”

In multiple categories, “Advyzon’s market share numbers are growing incrementally higher than last year in the larger firm areas of the chart.”

The report also notes that “Advyzon enjoys higher ratings among more experienced advisors than newer ones and earned extraordinary ratings among the largest firms that are using it.” That being said, “Advyzon didn’t register an unpopular demographic anywhere in the survey.”

Advyzon is currently serving over 1,500 advisory firms with a rapidly growing user base. The great strides Advyzon has made in the last few years to improve its offerings to advisors has been driven by advisor feedback at every stage of development.



Shane Young, Chief Financial Officer, Advyzon

ADVYZON INTRODUCES NEW CHIEF FINANCIAL OFFICER

Advyzon recently announced the hiring of a new Chief Financial Officer, [Shane Young](#). Young will help Advyzon executives analyze strengths and weaknesses in the company's finances and will oversee all aspects of the firm’s financial success.

Prior to joining Advyzon, Young worked as Director of FP&A at Crownpeak, a fintech solution that powers seamless, accessible, and revenue generating digital experiences anytime, anywhere. He also previously served as an Associate at ShoreView Industries and K1 Investment Management after graduating from Loyola Marymount University with a BBA in Finance.

To learn more about Young, [please click here](#).

ABOUT ADVYZON

Advyzon provides comprehensive, intuitive, cloud-based wealth management technology and investment management services for independent financial advisors and registered investment advisors (RIAs). The Advyzon tech platform combines portfolio management, customizable performance reporting, trading and rebalancing, client web portals, client relationship management

(CRM), client billing, and document storage, along with investment management services and a model marketplace offered by Advyzon Investment Management, LLC. A team of entrepreneurs led by CEO Hailin Li, Ph.D., CFA®, Advyzon strives to innovate in strategic and useful ways. Their exceptional technology and unmatched service exist to improve the advisor experience – whether it’s via portfolio and firm management or client relationships and growth. To learn more about Advyzon, visit www.Advyzon.com. To learn more about Advyzon Investment Management, visit www.AdvyzonIM.com.

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